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From left: Suzanne Siracuse of Suzanne Siracuse Consulting; Rita Robbins of Affiliated Advisors; Christy Hansard of FinoBlue Planning; and Chrissy Lee of Merit Financial Advisors speak on a panel at the T3 Conference in New Orleans on Wednesday, March 11, 2026.
Rob Burgess/Financial Planning

How firms get advisors to adopt new AI tools
By Rob Burgess
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For some wealth management firms, buying technology is the easy part. Getting financial advisors to actually incorporate it into their daily workflow? Much harder.

"There's a million vendors out there, but getting advisors to use it and adopt it is a different story," said Suzanne Siracuse, founder and CEO of Suzanne Siracuse Consulting, during a March 11 panel on "AI, Automation and Adoption" at the

Technology Tools for Today (T3) conference in New Orleans.

That often starts with showing advisors how the tools can bring value to their practices — in areas including behavioral analysis, prospecting, note-taking and planning software, panelists said.

Siracuse moderated the panel, which featured Rita Robbins, president of Affiliated Advisors in New York City; Christy Hansard, a financial planner with FinoBlue Planning in Atlanta; and Chrissy Lee, chief operating officer of Merit Financial Advisors in Atlanta.

Using AI for behavioral analysis and prospecting

Lee said she has seen AI provide value within a firm's HR department for tasks like writing job descriptions and conducting behavioral assessments. The latter task has been used with clients, too, she said.

"They might say one thing [about] how they feel about money and their future, but their behavior, that natural tendency, [can] sometimes be very different," she said.

In addition to assessments, Lee said AI can be useful for scanning public information. The software her firm uses, DNA Behavior, can analyze publicly available data to create a profile of an individual, even if they haven't taken an assessment. That kind of insight can be helpful in early conversations, she said.

"It really helps with prospecting, to be able to have that understanding of somebody," she said. "Not that you're going to completely go off of that, but it does help you understand what's important to them through that public persona."

Note-takers are proving essential

AI note-takers have exploded in popularity recently, according to the latest T3/Inside Information survey, which tracks technology adoption trends among financial advisors and their firms.

Hansard said her firm uses Jump AI fairly heavily. Relying on the software to take meeting notes and keep track of conversations has saved her firm countless hours, she said — time that can then be used to better serve clients.

"This isn't replacing the advisor," she said. "This wasn't where you were adding value. This isn't where you were applying your skills."

Another major player in the note-taking category is Zocks, which Robbins said her firm uses extensively. In fact, the firm instituted a rule that advisors should not come to an internal meeting without using Zocks.

"We have an agenda," she said. "We know what we're going to do after the meetings. [We know] who's responsible for deliverables. So it's not scrambling in

an unprepared way from meeting to meeting."

AI for tax and estate planning

Hansard said her firm previously used Holistiplan for tax planning but switched about a year and a half ago to FP Alpha, a platform that analyzes tax returns and estate documents to generate planning insights. She said her firm had valued Holistiplan for its tax projections, but FP Alpha could provide snapshots for estate and insurance planning.

"It was a need that our clients brought to our attention," she said. "It was a sticky relationship builder, because it added so much ... that was important to them that they felt was missing."

Hansard added that since adopting the estate planning technology, attorneys have begun providing referrals.

"It's expanded our capabilities without expanding our need for human capital to do that, which was powerful," she said.